

**Liberal Party of Canada (Ontario)**

**Executive Handbook for  
Electoral District Associations**

**2014 Edition**

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Produced by Tyler Banham, Executive Vice-President  
Liberal Party of Canada Ontario

  
**Liberal**

# Table of Contents

<b>Page No.</b>	<b>Title</b>
2	Introduction, Tyler Banham
3	Letter from Federal Liberal Leader, Justin Trudeau
4	Letter from Brett Thalmann
5	Important Liberal Contacts
6	LPC(O) Outreach Assistance / LPC(O) Services
7	LPC(O) Organizational Chart
8	Services for Electoral District Associations
11	Legal & Constitutional Responsibilities for your EDA
13	Role of the EDA President and other Executive Positions on your EDA
18	The LPC(O) Policy process & your EDA
22	How to recruit more women by Dr. Carolyn Bennett
23	How & Why to start a Women's Liberal Club in your EDA?
25	How & Why to start a Young Liberals Club in your EDA?
28	Best Outreach Practices, Ron Hartling
31	Objectives of the Aboriginal Peoples' Commission (Ontario)
33	How to write your own EDA Newsletter, Tristan Joseph
34	What is Victory Fund & how does it help your EDA?
35	Fundraising & Event Ideas for your EDA
36	FAQs about the Candidate Selection Process
38	The Role of a Past Candidate in your EDA, Mark Jessop
40	EDA Annual General Meeting Guidelines / Documents
41	EDA Sample Meeting Agenda and Sample Minutes
43	Sample Fundraising Letters & Sample Press Releases
46	A Brief Guide to Liberalist
50	Roberts Rules of Order
52	GLOSSARY

## **INTRODUCTION**



Welcome to the LPC(O) Executive Handbook for our Electoral District Associations – 2014 Edition.

The 2014 edition of the Executive Handbook builds on the success that the inaugural 2013 edition generated throughout Ontario with our EDA Executives. Through my conversations with grassroots Liberals, I understand the EDA Executive Handbook has been used in EDA's all over Ontario from Kenora to Niagara, from Ottawa to Hamilton, from Toronto to Windsor, from Cambridge to London.

The EDA Handbook is designed to help provide guidance and direction to EDA Federal Liberal executive members.

The Handbook contains job descriptions for the roles on a Federal Liberal EDA executive, fundraising, sections on responsibilities for other positions on the executive, updated legal & compliance requirements, templates, and sample letters.

The 2014 edition contains many new features such as:

- a letter from our Federal Leader, Justin Trudeau,
- submissions from the Ontario Young Liberals, Ontario Women's Liberal Commission, and Aboriginal Peoples Commission (Ontario)
- How to write your own EDA e-Newsletter
- How to draft a policy resolution
- What is the role of a past Federal candidate in an EDA
- The need for more women at the EDA level by Dr. Carolyn Bennett
- Outreach Best Practices
- A brief guide to Liberalist
- A reference guide to the National Nomination rules

Please read the entire document and pass it along to new or aspiring members of your executive for a further explanation of their roles. I know many EDA's use the Executive Handbook throughout the year at their Executive meetings.

I would like to thank the entire LPC(O) staff, LPC(O) executive, numerous EDA Federal Presidents, and our MP's for their assistance in producing the 2014 edition of the Executive Handbook. I could not produce the 2013 or the 2014 Handbooks without your help. Thank you to all Liberals who delivered submissions for the 2014 Handbook!

If you have any recommendations for the 2015 handbook, please do not hesitate to contact me at [evp@lpc.o.ca](mailto:evp@lpc.o.ca).

Liberally,

A handwritten signature in black ink that reads "Tyler Banham". The signature is written in a cursive, flowing style.

Tyler Banham  
Executive Vice President – LPC(O)



## Justin P.J. Trudeau

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Leader of the Liberal Party of Canada  
Chef du Parti libéral du Canada

March 14<sup>th</sup>, 2014

Dear Friends,

I would like to take this opportunity to thank you all for making 2013 one of the most successful years ever for the Liberal Party of Canada. Tireless work and outreach in your ridings resulted in record fundraising, membership and supporter numbers, and shows that the Liberal Party of Canada is serious about offering a real and fair chance for Canada's middle class.

The enthusiasm and determination that I have seen from the various Liberal Party of Canada (Ontario) Associations is something that I both admire and respect. It is this commitment to the Liberal Party that will help us build a better Canada; a Canada that we can all be proud of. In 2015, it will be engaged people such as yourselves who make the difference. Grassroots involvement is of the utmost importance as we work together to reinforce our shared, Canadian values.

It is my sincere wish that as we move forward, we will continue to build on the hope and hard work exemplified by all Liberal Associations in Ontario.

Sincerely,

Justin P.J. Trudeau  
Member of Parliament for Papineau

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**Chambre des communes**  
Pièce 533-S, édifice du centre  
Ottawa, (Ontario)  
K1A 0A6

**Circonscription**  
529 Jarry Est  
Bureau 302  
Montréal (Québec)  
H2P 1V4

**House of Commons**  
Room 533-S, Centre Block  
Ottawa, ON  
K1A 0A6

**Constituency**  
529 Jarry East  
Suite 302  
Montreal, QC  
H2P 1V4

## **Brett Thalmann– Director of Operations at LPC(O)**

I am very excited about taking on this new role of Director of Operations at LPC(O). I am looking forward to working with you and I wanted to briefly introduce myself and share my vision for LPCO as we work together to prepare for the next general election.

I bring over ten years of experience working with the Liberal Party to this role. I have been involved with several national and regional campaigns, worked for a Liberal MP on Parliament Hill and currently serve as an active riding executive member and treasurer.

These experiences have provided me with valuable insight into how the central party can further support volunteers and riding associations, as well as improve communications and information sharing.

This is an exciting time for our party. People are listening to what we have to say and they're signing on to the movement that we are building together. We need to capitalize on this momentum as we prepare for a general election.

For the Liberal Party of Canada, 2014 is the Year of the Volunteer. Our goal is to develop a culture of volunteering throughout our organization, and to work with riding associations to build their volunteer capacity. If we want to win the next election, we need volunteers in every riding, city and neighbourhood, knocking on doors, making phone calls, and growing our movement.

To help riding associations achieve success in 2015, we have an experienced team of field organizers eager to offer their assistance. Don't ever hesitate to reach out if you are looking for guidance or support.

Collectively, we as a party have a lot of work to do in the lead up to the next federal election. I am thrilled about the incredible grassroots excitement around our Leader and the Party and I look forward to serving you and working hard with you in my new role.

Brett Thalmann

Twitter: @bthalmann  
[brett.thalmann@lpc.ca](mailto:brett.thalmann@lpc.ca)

## **IMPORTANT CONTACTS**

### **Liberal Party of Canada (Ontario)**

10 St. Mary St, Suite 420

Toronto, ON M4Y 1P9

(416) 921-2844 Toll Free: (800) 361-3881

Fax: (416) 921-3880

[admin@lpco.ca](mailto:admin@lpco.ca)

### **Helpful Links**

[Governance Documents:](#)

[LPC Constitution, LPC \(O\) Constitution, Model Constitution, Rules of Procedure](#)

[Liberal University](#)

[National Membership Rules](#)

[Extranet](#)

[Liberalist](#)

### **LPC(O) Management Committee**

At each LPC(O) Biennial Meeting, members of the Management Committee are elected to two year terms to oversee the functioning of the various aspects of party activities. The "Management Committee" includes the seven Table Officers, the President of the Ontario Young Liberals (OYL), the President of the Ontario Women's Liberal Commission (OWLC), the President of the Aboriginal People's Liberal Commission (Ontario) (APLCO) and the six Regional Presidents.

Please visit our website below for each Table Officer and Regional Presidents' contact information: <http://ontario.liberal.ca/management-committee-and-area-representatives/>

## **LIBERAL PARTY OF CANADA (ONTARIO) – ASSISTANCE**

LPC(O) is organized to assist EDA Presidents and their associations.

You can find valuable resources on LPC(O)'s website – [LPCO.ca](http://LPCO.ca) – which contains a myriad of helpful information.

The LPC(O) Director of Operations, Brett Thalmann and the Ontario political operations team are ready to help you with the challenges of running your EDA.

Each EDA has an LPC(O) Outreach Officer assigned specifically to their region to help with any questions, logistics, planning, or problems which come up with their EDA.

### **LPC(O) Outreach Officers will also assist you with:**

- The planning and delivery of the LPC(O)'s programs and events to its EDAs.
- Helping to develop EDAs Strategic plans and providing assistance and guidance in setting and meeting the membership and Victory fund targets, general outreach activities and fundraising initiatives
- Working to ensure that EDAs are in full compliance with all of the Party regulations, Elections Canada rules, guidelines and laws.
- Facilitating and officiating Liberal Party of Canada (Ontario) meetings
- Assisting in the planning and co-ordination of election efforts

EDA presidents should be in frequent contact with their Outreach Officers and should capitalize on the talented staff at LPC(O) to help them

Through our IT Director, LPC(O) offers IT support for EDA Microsite management and assistance with posting EDA special events online.

Through our Financial Administrator, LPC(O) also offers help with EDA Financial administration, Elections Canada Compliance, and donation receipting.

Our Membership Administrators at LPC(O) can input, track, and verify Party memberships. EDA Membership lists are compiled by the Membership Administrators.

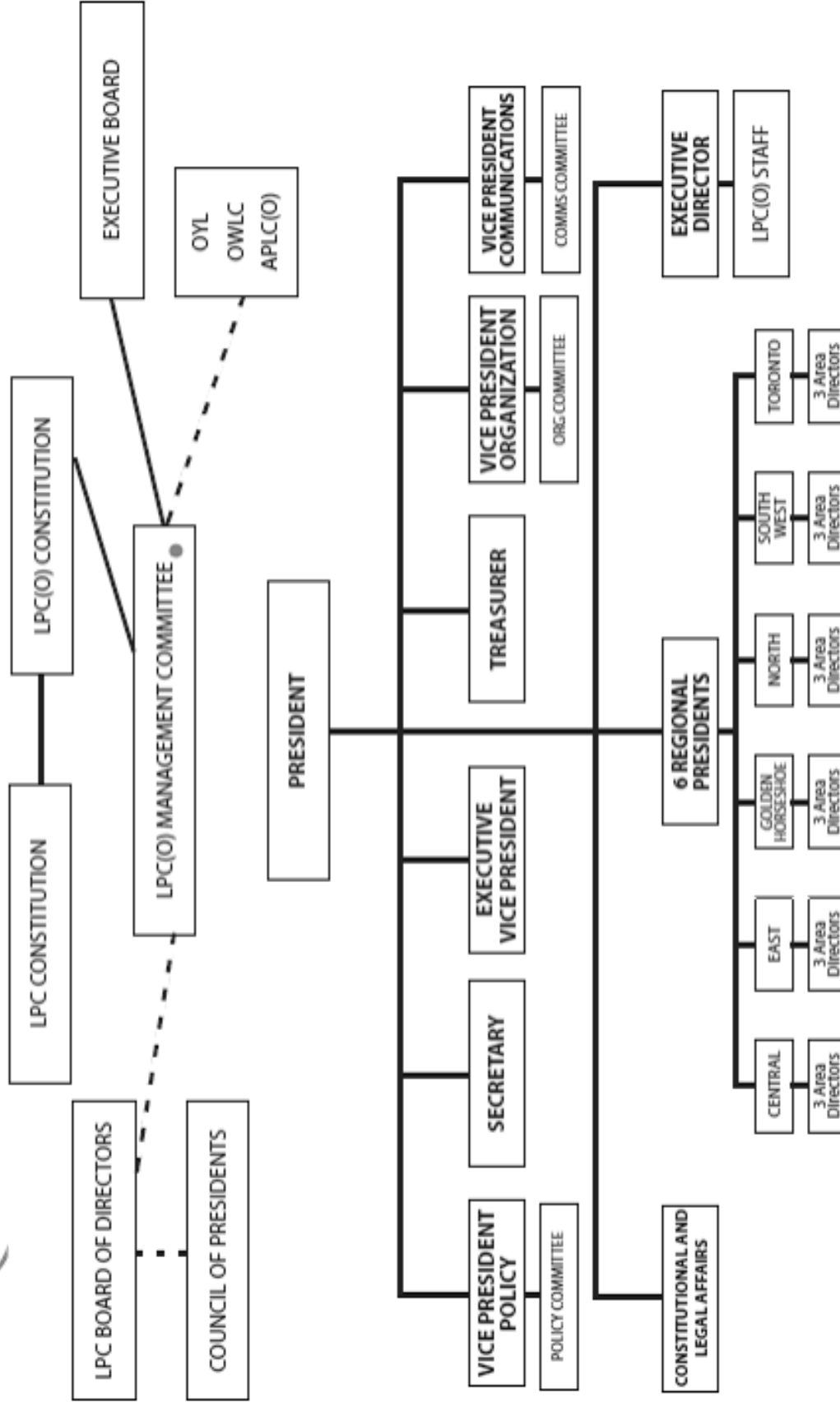
The current LPC(O) staff are listed on the website and can be contacted anytime during the week at LPC(O)'s office.

<http://ontario.liberal.ca/contact/>

**LPC(O) Organization Chart**



LPC(O) Organization Chart (Management Committee)



Regional Presidents and Area Directors work in close association with Political Outreach Officers of LPC(O) staff.

• Titles in bold indicate members of the Management Committee. Presidents of OYL, OWLC and APLC(O) and are also on management committee.



## **Services for Electoral District Associations**

The Liberal Party of Canada (Ontario) is here to help.

Many EDAs may not be fully aware of the extent of services available through our offices. Below you will find a breakdown of some of the services provided for riding associations, Please call us anytime for any assistance you may require.

**It is our goal to serve you better and work together to win the next election!**

### **Liberal Party of Canada (Ontario) Events**

<b><i>General Meetings</i></b>	Organize and administer the LPC(O) General Meeting.
<b><i>Executive Board</i></b>	Organize and administer LPC(O) Executive Boards.
<b><i>Event Insurance</i></b>	Facilitate coverage through LPC(O)'s insurance provider for local non-alcoholic riding events at no charge to the riding association.  Provide assistance to the riding association to find other insurance companies that will cover events involving alcohol consumption. In these cases, the riding association is responsible for any fees associated with coverage
<b><i>Regional Meetings</i></b>	Assist Regional Presidents with organization and administration of the LPC(O) Regional Meetings.
<b><i>Policy Rallies</i></b>	Assist VP Policy with the organization and administration of policy meetings at the provincial, regional and riding levels.

### **Financial Services**

<b><i>Quarterly and Year-End Financial Reports</i></b>	Prepare and distribute quarterly financial reports for each riding association, detailing activities in the riding trust accounts.  Prepare and distribute a year-end schedule of transactions between the EDA and LPC(O) to assist CFOs with their annual report to Elections Canada.
<b><i>Membership Fees, Chequemate and Donations</i></b>	Process funds received at LPC(O) on behalf of riding associations for riding membership fees and donations. Applicable funds will be credited to the riding association trust account and either applied to their debts, or sent back to the riding association on a quarterly basis.
<b><i>Elections Canada Compliance</i></b>	First line resource on compliance issues for riding association CFOs and Treasurers with inquiries relating to Elections Canada, the Elections Act, and the Election Finances Act.
<b><i>LPC Financial Liaison</i></b>	Liaise with LPC (Ottawa office) financial management and accounting staff to ensure any issues are properly resolved in a timely manner.
<b><i>Tax Receipts</i></b>	Provide assistance to obtain lost or misplaced receipts. Facilitate the sending of contribution amounts to LPC for the issuance of tax receipts.
<b><i>Donation Administration</i></b>	Process credit card donations and event charges through Moneris program.

### Products and Design

<b>Buttons</b>	Assistance with button design and manufacturing.
<b>Brochures</b>	Assistance with design and printing.
<b>Training</b>	Development of training modules and workshops.
<b>Riding manuals</b>	Currently under revision or reconstruction.

### Technological Services

<b>Tech Support</b>	Provide associations with tech support including office networking, correction of document errors, and general trouble shooting.
<b>Liberalist Support</b>	Provide associations with support specific to Liberalist and its applications.
<b>EDA Web site</b>	Assistance in setting up EDA web site
<b>Coming Events</b>	Ridings may post any association event details and links on LPCO.ca
<b>LPC IT Liaison</b>	Liaise with LPC Technical staff to ensure any issues are properly dealt with in a timely manner. Ensure that Liberalist access is distributed to the ridings.
<b>LPC(O) Web Site</b>	Maintain, post, and update staff and party official contact information. Maintain upcoming events page(will post local event upon request) Post LPC and LPC(O) governance documents.

### Membership

<b>Membership Processing</b>	Input, track, and verify members who join the Liberal Party of Canada. Prepare voters lists for AGMs, nominations, and delegate selection meetings.
<b>Membership Forms</b>	Administer, track, and distribute membership forms to riding associations, candidates for nomination, recruiters, and to individuals who would like to join the party. Up to 25 membership forms can be purchased from LPC(O) at a cost of \$1 per blank form 25 at a time as per membership rules.
<b>Party Compliance</b>	Ensure membership rules are being enforced during nomination periods, leadership competitions, AGMs, and DSMS.
<b>Current and Past Membership Lists</b>	Provide an updated current or past membership list at any time upon request from the Riding President or Membership Secretary.
<b>Membership Drive</b>	Provide staff support and assistance to develop and execute a membership drive within a riding.
<b>Chequemate Processing</b>	Input and track Chequemate pledges on a monthly basis, including both credit card and chequing account donors. Ensure automatic membership renewal each September for the upcoming year.

### **Political Organization and Outreach**

<b>Notice Mailings for AGMs, DSMs, and Nomination Meetings</b>	Produce and distribute notices to association members for upcoming Annual General Meetings or Delegate Selection Meetings in the riding. Will facilitate additional inserts. Additional costs are billed back to the riding association through the riding trust account.
<b>EDA Meetings</b>	Administer EDA DSMs and AGM elections, and ensure proper compliance. Assign meeting chairs for the riding AGM and/or DSM. Prepare and provide scripts, ballots, voting lists, and additional meeting logistics.
<b>Training Sessions</b>	Coordinate and conduct training sessions for ridings on a range of subjects including membership, fundraising, communications, and election readiness. Sessions are held at the LPC(O) Executive Board, Annual General Meetings, and Regional Meetings across the province. Other sessions are available to individual ridings or groups of ridings upon request.
<b>Record Keeping</b>	Maintain current and historical records for riding association and commission constitutions and executive lists. Maintain riding association and commission meeting minutes on file at LPC(O) as requested.
<b>By-elections</b>	Assist in by-election efforts by providing staff and monetary resources.
<b>Nominations</b>	Provide staff resources to the campaign committee in the preparation of voting lists/membership lists, notices, site selections, ballot preparation, and DRO and volunteer recruitment. Facilitate the preliminary meeting with meeting chair, returning officer, riding president, candidates, and their agents to establish meeting procedures in advance of the nomination meeting,
<b>Facilitate Communication</b>	Provide updates re: changes to LPC/LPC(O) constitutions and by-laws. Update web page regularly and maintain email addresses for all riding presidents on the site. Will post local events upon request.
<b>Fundraising &amp; Events</b>	Will assist ridings to develop and execute fundraisers or local events.
<b>Use of LPC(O) Postage Machine</b>	Ridings can come to the LPC(O) office during regular business hours and use the postage machine for mailings. Postage costs will be billed back to the riding association through the riding trust account. Our folding machine is also available for onsite use by appointment.
<b>Phone Banks</b>	Provide ridings with the use of telephones as a phone bank for any follow-up activities in your ridings, subject to availability. There are generally 4-12 telephones available depending on the time of day you would like to make calls. (toll free lines)
<b>Voice Mailboxes</b>	Provide ridings with their own voicemail box for RSVP lines for events and fundraisers. Ridings are able to access the voicemail box to check messages at any time using a toll free number
<b>Faxes</b>	Use of LPC(O) fax machine at no charge.
<b>Photocopying</b>	Use of LPC(O) photocopier for smaller quantities at no charge.
<b>Party Compliance</b>	Ensure that riding remains current and compliant to all LPC and LPC(O) constitutional requirements. Provide documentation to assist ridings with EC yearly compliance filings.
<b>Policy Committee</b>	Assist with developing strategies that help facilitate the grass roots policy development process.
<b>OYL &amp; OWLC</b>	Assist with the establishment and maintenance of Youth and Women's clubs.
<b>Plan Creation</b>	Assisting ridings with the production of strategic plans and EDA work plans.
<b>Awards</b>	Administer volunteer and riding awards program.

## **LEGAL AND CONSTITUTIONAL REQUIREMENTS:**

Please find in this section the minimum reporting requirements as required by:

- Elections Canada
- The Liberal Party of Canada, and
- The Liberal Party of Canada (Ontario)

**Please note that the reporting requirements stipulated by Elections Canada are mandatory. Failure to comply will have serious penalties.**

The rights and obligations under the Liberal Party of Canada and the Liberal Party of Canada (Ontario) are all outlined in both bodies' constitutions which may be found online at **liberal.ca** and **lpc.o.ca**. Additionally, if questions or concerns arise, please contact either your LPC(O) outreach worker or your regional President.

### **Elections Canada**

As a recognized political entity, electoral district associations are required to file certain document with Elections Canada. In general, it is the President of the association that is responsible with ensuring these documents are filed on time. **Failure to comply with Election Canada requirements could result in the deregistration of your EDA.** If you are unsure of this requirements or are experiencing any difficulty please call LPC(O) for assistance ASAP.

The following form is used to register new associations, annual confirmation of the registry and to change information for the registry  
[http://www.elections.ca/pol/dis/formsreg/ec20380\\_e.pdf](http://www.elections.ca/pol/dis/formsreg/ec20380_e.pdf)

- Annual Statement of Registry Information (Yearly no later than May 31)
- Registered Association Financial Transactions Return (Yearly - Due end May 31)
- Report of appointment of the electoral district agents of a registered association (if required) (persons eligible to receive funds for the ED)
- Report of changes to the information in the Registry of Electoral District Associations (must be reported within 30 days of the change)

It the responsibility of the President and Treasurer (Official Agent) to ensure these forms are filed with EC and that a copy is shared with the LPC(O) office.

## **Elections Canada Links**

For more information, and PDF versions of the forms mentioned above, please visit the Elections Canada website:

<http://www.elections.ca/content.aspx?section=pol&document=index&dir=dis/formsreg&lang=e>

Elections Canada Checklist for the Party's Chief Financial Agent:

<http://www.elections.ca/content.aspx?section=pol&document=index&dir=pol/forms/sup&lang=e>

Elections Canada's (FAQ) Frequently Asked Questions on Political Financing:

<http://www.elections.ca/content.aspx?section=fin&dir=faq&document=index&lang=e>

Ridings are also governed by the constitution of The Liberal Party of Canada  
The following is a list of responsibilities and rights under the Liberal Party of Canada Constitution.

The numbers refer to the specific sections of the Constitution: See Chapter 4 ,19, 20 and 21

- (19)(3)(c): Must appoint a Financial Agent, certified under the Elections Act, who is approved by the Chief Financial Officer. This should be the EDA treasurer whenever possible.
- (19)(3)(d): Must appoint an auditor, certified under the Elections Act, who is approved by the Chief Financial Officer
- (24)(1)(a) President's right to sit on the National Council of Presidents
- (19)(2)(c) Provide for the election of a President, Fundraising Chair, Policy Chair and  
Membership chair by a vote of all its members
- (69)(1)(d) President is Ex-officio delegate to LPC Conventions

The following is a list of rights and responsibilities under the Liberal Party of Canada (Ontario) Constitution. The numbers refer to the specific sections of the LPC(O) Constitution:

- (V)(7)(b) – Riding President or designate is a member of LPC(O) Executive Board
- (VII)(3)(a) – Riding President and immediate past candidate are Ex-officio delegate to LPC(O) AGM
- (XII)(3)(a) – EDA must provide copy of its Constitution to LPC(O) within 10 days of any amendment
- (XII)(3)(d) – EDA must send Executive list to LPC(O) within four (4) weeks of AGM
- (XII)(3)(o) – President and Official agent must sign yearly financial statements and submit to LPC(O) by end of March.

## **ROLE OF THE EDA PRESIDENT**

The various roles of the EDA President can be divided into two basic categories, external and internal functions. Internal functions are those activities within the association and external are those directed outside of the association. It is important that the President have a working knowledge of all Liberal Party governance documents (see page 3 helpful links)

Many of the external functions have been touched upon in the above section, under the legal and constitutional requirements. **For example, attending the Executive Board meetings and conventions would be examples of responsibilities outside of the EDA, in other words, an external function.**

Listed below are additional **external** responsibilities of the President:

- Unless otherwise determined by the executive to be the public spokesperson for the EDA should the need arise.
- The President is the voice of the EDA at Executive Board or regional meetings.
- The President must ensure that the EDA complies with non-financial reporting requirements of the Canada Elections Act.

In addition to attending all of the above meetings, the President should:

- Endeavour to attend all meetings as they arise, whether convened by LPC(O) or LPC.
- Encourage other members of her/his executive to accompany her/him to Executive Board meetings, regional meetings, and other meetings where one is not required to compete for a delegate position.
- Use the services of the outreach officer, regional President, and area co-coordinator assigned to your EDA whenever possible. These people are there to help you, and to assist your EDA.
- In addition to the responsibilities as outlined in the LPC(O) constitution, the President is also expected to:
  - Attend regional meetings or send a designate.
  - Attend training courses or send a designate.
  - Communicate regularly with the designated outreach worker regarding: Coming events with the riding, Scheduling of Annual General Meetings, reporting changes to the executive, discussing possible; changes to the constitution, and any other issues which may require assistance or support.

## **INTERNAL FUNCTIONS OF AN EDA PRESIDENT**

The internal functions of the EDA President can be extensive. Unlike the external functions which are largely determined by the Elections Canada, the Liberal Party of Canada and the Liberal Party of Canada (Ontario), the internal functions are governed in some part by the EDA's constitution but more likely by precedent, the example set to date by the association. Below is a list of many of the administrative tasks for the EDA President:

- Preside at all executive and/or board meetings and EDA meetings.
- Ensure that the EDA sets regular meeting dates for the coming year.
- Seeks Executive approval to set the date for the annual general meeting (AGM) and any delegate selection meetings that may arise. For more information about AGMs please see pages 15 and 16)

- Together with the Recording Secretary, set agendas for executive/board meetings and make sure they are sent out well in advance to all members of the executive/board. (see page 17)
- **Ensure that the EDA creates a Strategic plan for your EDA and work to see that it is followed.**
- Communicate! Make sure you share with your EDA what you experience at Executive Board meetings. Share all communications you receive from LPC(O) and from your regional President. Keep everyone informed. Members want to feel connected to the central party and you are their conduit.
- Encourage members to run for positions on the EDA executive.
- Encourage members to run for delegate positions for conventions.
- Know the rules of your EDA's constitution and party Governance documents and ensure they are followed.
- Conduct the meetings and business of the EDA in a professional manner.
- Have the Vice-Presidents or Directors lead or join committees. This is a positive way to encourage participation, build skill, and have more members involved.
- Ensure members are engaged in the activities of the EDA. One way is to suggest that members join committees.
- Monitor committees' progress.
- Executive members and chairs should all report to the President.
- Monitor all progress and conduct regular follow-up.
- Have all necessary powers to ensure the daily functioning of the Association.

### **EDA Recording/General Secretary :**

The General Secretary of the EDA, on the instruction of the President, shall call and set the agenda for all meetings of the EDA and of the EC. The General Secretary shall keep written minutes of each meeting and shall distribute such minutes of each meeting at the subsequent meeting for ratification. (See page 17) The General Secretary shall keep a record of all EDA correspondence and ensure that the riding constitution remains compliant with the provisions in both the LPC and the LPC(O) constitutions.

### **ROLES OF OTHER EXECUTIVE POSITIONS**

**(refer to riding Constitution and/or the model constitution for additional Information)**

#### **EDA Treasurer / Financial Agent:**

The Treasurer fulfills one of the most important roles in the entire EDA executive. The treasurer completes the year-end report that is sent to Elections Canada and is held accountable for all financial issues arising with Elections Canada. The treasurer ensures that all bills are paid according to the instructions of the executive and reports on the state of finances available to the EDA at each executive meeting. They will liaise with the relevant banking institutions to ensure that proper records are kept. In addition, they are responsible for maintaining records of incoming donations and the payment of all EDA expenses with the approval of the Executive. Official agents must be familiar with EC requirements found on the elections Canada web site:

<http://www.elections.ca/content.aspx?section=pol&document=index&dir=pol/forms/sup&lang=e>



## **EDA Membership Secretary (VP Membership)**

The membership secretary is a valuable role for an EDA executive member. The main role of the Membership secretary is to drive the sale of memberships in the riding. Accurate up-to-date membership records can be obtained by consulting regularly with LPC(O) and or directly through Liberalist. Party memberships can be purchased both online at Liberal.ca or by filling out a paper form and submitting it to LPC(O). LPC(O) maintains member records through the National Membership Registry (NMR) Database which then feeds membership information into Liberalist daily. All membership applications received in the riding must be sent (payment attached) to LPC(O) Memberships are only valid when received and verified by the PTA office. Riding president receive regular notification of members, supporters or volunteers who sign ups via the web site and LPC(O) provides updates on memberships received in the office. Is important for the executive to make contact with those who are reaching out to you. Themed Membership drives have proven to be a great way to sign up new members and renew those that have lapsed as well as engage Liberal minded people in the riding.

'Associate' membership status is for those members who live outside the boundaries of the riding, as defined by Elections Canada. These members may sit on the riding executive board if elected and contribute fully, but they may not vote in a riding AGM or nomination meeting. It is important for the Membership Secretary to maintain up-to-date information about associate members.

'Supporter' status, introduced in early 2012, allows non – members to participate in the selection of the LPC Leader in 2013. It is the responsibility of the Membership secretary to keep accurate records through Liberalist of supporters in their riding. (See section 11 for more information)

The National Membership Rules can be found on the [LPC\(O\) website](#).

## **Communications Chair (VP Communications)**

The communications chair/VP Communications is responsible for ensuring that riding communications are regular, consistent and valuable. The VP Communications should chair a committee of board members who:

- Maintain the riding website and Facebook page
- Send out a newsletter on a monthly or quarterly basis
- Prepare advertisements for fundraisers and other riding events
- Correct and expand riding emails in Liberalist

For more information, please refer to the Brief Guide to Communications for Electoral District Associations prepared by Jason Cherniak, VP of Communications and the communications committee.

## **Policy Chair (VP of Policy)**

**Policy Committee:** The EDA-VP of Policy (Chair) is responsible for assembling and chairing the EDA Policy Committee. The Policy Committee should include members from the executive as well as from the general membership. The chair should have a strong, demonstrated grasp of the rules of procedure. Voting privileges within the Policy Committee should be approved and ratified by the EDA executive. Any policy goals and/or activities pursued by the Policy Committee within the riding must also be approved by the EDA executive.



**Local Policy Liaison:** The EDA-VP of Policy should strive to keep the EDA executive, the general members and the PTA Policy committee informed about developing trends within the community by serving as an intermediary between the various components. A regular update in the EDA newsletter or on the EDA web site is a good option for improving communication and feedback.

**Identifying Issues:** The Committee should develop a list of policy issues that it believes further discussion and debate would be beneficial. Committee members can then be assigned topics of interest in order to conduct further research. This research should be summarized and prepared for the next general meeting or policy forum where issues can be further discussed and resolutions proposed.

**Engagement:** The EDA-VP of Policy (Chair) should consider a number of options for engaging the Liberal EDA membership, its supporters as well as general members of the community by planning events that stimulate and encourage input and discussion.

**Town Halls      Panel Discussions      Discussion Groups**  
**Debates          Policy Socials**

**Documentation:** EDA-VP of Policy (Chair) is encouraged to document and share results with their EDA Executive, their Area Policy Representative and VP of Policy. Use regional meetings to gain support and share ideas for improving resolutions. Notification will be given when policy resolutions are to be submitted by EDAs to LPC(O) for prioritization and submission to LPC.

### **Outreach Chair (VP Outreach)**

The Outreach Chair manages and leads your EDA's outreach program, which encompasses all activities undertaken by your riding association for the purpose of connecting with and earning the confidence of the larger community in your riding beyond known Liberal members and supporters. Whereas campaigning necessarily focuses on identifying and getting out the Liberal vote within the confines of a typical 35-day writ period, outreach is about changing hearts and minds. It involves gradually and respectfully building trust, mutual understanding, goodwill and relationships, demonstrating to our fellow citizens that Liberals truly share their values, care about the same issues and offer real solutions. Outreach is the core job of EDAs between elections. It has to be done locally, by people meaningfully engaging with people.

Effective outreach starts with listening. Identify key segments within your community. Speak with both opinion leaders and ordinary citizens from each target segment to learn the circumstances that define that grouping, their concerns and the issues that matter to them. Only then, start to consider how federal Liberals might be able to help and possibly champion those issues in a way that aligns with Liberal values. Finally, visibly demonstrate those values in action through appropriate outreach activities.

By engaging your members in tangible actions that put Liberal values in action, do good in the community and do what they see as the right thing, you are reinforcing their commitment to the Liberal Party. Stretching yourselves to put on events and engage in activities for which you may not have as many volunteers as you would like tends to result in new volunteers coming forward. Youth in particular are natural activists and crave meaningful volunteer activities. Fail to provide those opportunities and you will lose them. An active and successful

outreach program builds riding associations, growing your membership, your volunteer cadre and your donor base while giving everyone good reason to take pride in being Liberal.

### **Fundraising Chair (VP Fundraising)**

The fundraising chair may be the most important post to be filled on the executive. While all executive members are expected to help fundraise towards a financially robust EDA association, the fundraising chair is expected to coordinate the efforts. In addition, the fundraising chair is expected to help procure the necessary funds to run a well-financed campaign for the next general election, whether in support of a Liberal MP or to elect a Liberal MP. They may establish a committee to ease the burden of responsibility from one person. They will also co-chair the candidate selection committee.

Together with the President and Membership Chair, the Fundraising Chair is further responsible for coordinating at least one Victory Fund Drive in the riding per year. For more information about the Victory Fund, please see page 24.

### **Election Readiness Chair**

An Election Readiness Chair is critical for pre-writ planning in advance of the general election in 2015. A multidisciplinary role, the Election Readiness Chair will have to liaise with every other committee chair in order to ensure that the EDA will be fully prepared for the coming campaign.

You will want to work with the President, Treasurer and Fundraising Chair to get a sense of what kind of funds your candidate and their team will be working with. Fundraising should not be left until the last minute. You will also want to work with the Membership Secretary and the Outreach and Communications Chairs to get a sense of how many people will need to be contacted before the writ drops to make the ask for sign locations and volunteers.

As the Election Readiness Chair, you should be putting yourself into the shoes of the next campaign manager. Your job is to make life as simple for that person and your next candidate as possible. In the months leading up to the campaign you should be scouting potential candidates to ensure that your EDA has the best possible person to represent them. Other key role responsibilities include plotting potential canvassing routes, using Liberalist and Elections Canada data to figure out which polls in your riding need the most attention in order to win/keep the seat, liaising with local party members on the location of the campaign office, and scouting potential supporters and members to volunteer for the campaign.

## **The LPC(O) Policy process & your EDA**

The Liberal Party of Canada's policy process links individuals, their community, their province/territory, the country and the Party together.

Policy development is an important engagement mechanism that provides direction to the Party from grassroots members and supporters. Ongoing policy activities at the riding level, in communities and online discussions across the country through the Liberal Community will continue to foster a culture of collaboration in the Party and help focus on forward-looking policies that address the pressing issues and challenges facing Canada today and in the future. These engagement activities prior to drafting resolutions for LPC(O) policy rallies and national biennial conventions are essential in order to include Canadians in the process and ensure their voices are heard.

The document, *Have Your Say: A Guide to Policy Development*, which can be found at <https://www.liberal.ca/files/2013/07/HAVE-YOUR-SAY.v2013.pdf>, outlines the policy process and various ways in which party members and supporters can become involved.

### **LPC(O) Policy Committee**

LPC(O) is committed to a policy development process that is inclusive, democratic and rational.

Inclusive = open and consultative  
Democratic = consensual  
Rational = evidence based

Integrating these objectives into the policy framework will ensure the development of Liberal Party policy in Canada that is progressive, compassionate and responsible. As such, the LPC(O) Policy Committee is committed to a process that complements the national model and one that supports EDAs in capacity building and community outreach.

The LPC(O) Vice President of Policy who acts as Chair establishes the LPC(O) Policy Committee comprised of members who fully represent Ontario's six regions. Each region includes three Area Policy Representatives; each representative is responsible for liaising with a number of EDAs within the region. One of the goals of the LPC(O) Committee is to help establish Policy Vice Presidents in all EDAs. Ensuring that every EDA has an active Policy Vice President and committee will help enhance policy development in ridings and regions.

More specifically, Area Policy Representatives are on hand to assist EDAs in several ways:

- **Organization**
  - help in the establishment of EDA policy committees by providing sample constitutions, facilitation of inaugural meetings and the offering of advice on the policy process
- **Training**
  - organize and deliver workshops
  - assist in revising and piloting training tools and other material
- **Research**
  - identify research or expertise for association events and activities
  - source research material upon request for the development of resolutions

- coordinate the delivery and collection of survey information
- **Events**
  - participate in events organized at the association level
  - organize cross-EDA policy events
  - coordinate and chair policy events in the region
  - assist in organizing and running LPC(O) policy events

Along with supporting EDA policy-related activities, the LPC(O) Policy Committee is responsible for assembling resolutions that may be passed by EDAs, regions, Executive Board and resolutions passed by delegates at policy rallies and ensuring that all such resolutions are forwarded to the appropriate body.

### **How to Write a Policy Resolution**

Resolutions are the end result of all efforts in the policy process.

A resolution is a statement, or set of statements, that clearly expresses a belief or a judgment on an issue of public policy. As well, it calls upon the Party to take a position or press for action. Resolutions should be concise, clear, based on accurate facts, and written to achieve a specific purpose. They should contain no more than 250 words.

Resolutions have four distinct sections:

**Title:** The title of a resolution should be concise, and quickly convey the subject of the resolution.

**Preamble:** The resolution must begin with a preamble.

A preamble begins with "Whereas". The preamble describes the situation, issue or context that gives rise to the resolution. As well, it lists facts necessary for the reader to understand the essence of the resolution. The preamble may state the reason the resolution is important. Finally, it offers arguments or attempts to anticipate counter-arguments, in order to command support. Preambles must be limited to six per resolution. The combined number of preambles and operatives (see below) cannot exceed eight.

**Direction (Operative):** The "Be it Resolved," (or "operative") section is the core of any resolution. It communicates the action that the authors want the Party to undertake. There may be several statements in the operative, depending on the complexity of the resolution. The operative section should not repeat information already in the preamble.

There cannot be any numbers or letters used as subsections in this part of the resolution and operatives that follow the first one must be preceded by the phrase "Be it further resolved". Operatives must be limited to a maximum of six per resolution. The combined number of preambles and operatives cannot exceed eight.

**Authorship:** The name of the resolution's sponsoring body must always be listed. In drawing up a resolution, one should always remain focused on what one is trying to achieve. Is the goal of the resolution to:

- express support for a government action or stance?
- suggest alternatives to current practices; or

- ask the Party to press the government to achieve a specific goal?

If the intention is the last, one should bear in mind:

- what is the actual goal?
- what are the ways to get there?
- is the goal realistic?
- does it fall under the authority of the federal government?
- how would the achievement of the goals be measured?
- what is the timeframe to reach the goal?
- do costs and benefits of the goal need to be assessed to strengthen support of the resolution?

A resolution is unlikely to be passed unless it calls for action or establishes a position that Liberals can understand and support. If a resolution is adopted, it will only have the desired effect if it is clear and recognizable.

Here are some common problems that weaken resolutions:

- The resolution lacks meaning, and it would not result in any measurable action.
- The resolution is too long, unwieldy, and hard to understand. It should be kept to 250 words
- Lack of factual accuracy.
- Inflammatory language.
- It does not fall under federal jurisdiction.

Finally, keep in mind that because time will pass between the drafting of the resolution and the Biennial Convention, resolutions should be current and relevant throughout the process.

## **SAMPLE RESOLUTION**

### **(Title) Land Mines**

(Preamble)

WHEREAS Canada has taken a leadership role in the elimination of landmines, with the recently signed Landmines Treaty;

WHEREAS these landmines have caused mass destruction, continue to kill and maim and destroy the quality of life for innocent people;

WHEREAS this treaty only deals with the manufacture of new land mines, the use of existing landmines and the destruction of already placed landmines;

WHEREAS the public has played a key role in furthering the principles of humanity as evidenced by the grassroots call for a total ban of antipersonnel mines;

(Operative)

BE IT RESOLVED that the Liberal Party of Canada support the government of Canada's efforts to continue leading internationally to ensure early ratification, universalization and implementation of the treaty, also known as the "Ottawa II" process;

BE IT FURTHER RESOLVED that the Liberal Party of Canada urge the government of Canada to broaden its outreach activities with schools, communities, NGOs and service organizations and work with these groups to establish a Canadian Mines Action Trust Fund to assist with the rehabilitation of persons affected by antipersonnel mines.

(Authorship)

National Policy and Platform Committee

## **MOVING FORWARD: How to recruit more women by Dr. Carolyn Bennett**

Recently we have been inspired by the Equal Voice campaign - 'Be Her or Support Her'.

It's clear that Canada needs to have way more women involved in politics and somewhat ridiculous to think that they all see themselves with their name on a ballot one day.

It is clear that it is impossible for women to even consider running for office without a posse of like-minded and committed people supporting her. We therefore have a challenge - we need 'backroom girls' in equal numbers to 'back room boys' if we are ever to attain gender parity amongst elected representatives.

This became very clear in June 2011, when our women's caucus was reduced to 17% of our caucus. We'd lost so many wonderful colleagues and had not elected one new female MP. When we looked at the percentage of EDA Presidents - it was 17%.

We don't believe that this is unrelated!

We need women moving up through the organization in all positions. Women are the organizers, fundraisers, policy makers, social media gurus in almost all other community organizations. Somehow, they haven't felt comfortable in partisan political organizations. This has to change !

I remember when I was first elected, Maureen Kempston-Darkers who was then the CEO of GM Canada, invited all female MP's to a dinner with members of her Women's Advisory Committee. She explained that she had a 'women's advisory committee' for 2 reasons - 1) to ensure that women were moving appropriately up in her organization & 2) to ensure that women were buying her cars.

Justin, our Women's Caucus and the National Liberal Women's Commission are focussed on ensuring that women will be appropriately placed in all positions within our party and also with the help of all of you, that our policies will reflect the needs of women and their families so that they will vote for us. Every day I am inspired by the motto at Women's College Hospital in Toronto - Non Quo Sed Quo Modo - it's not only what we do but how.

The research is clear that once one achieves a critical mass (at least a third) of women in any organization the culture changes. Definitely the 'what' changes but also the 'how' - less 'gotcha', winners/losers, more inclusive-decision making, consensus, win/win.

As we said in the Change Commission Report - good governance is fair, transparent and takes people seriously. We know that if we don't deliver 'good governance' in our 'grassroot' organizations - our EDA's, it will be hard to convince Canadians that we will govern that way.

So we need to begin by ensuring that our EDA executives reflect gender balance as well as the diversity appropriate to each riding. We clearly need more women as presidents of the EDA's. We need women to run for PTA executives and for the National Board positions. We need more women trained as campaign managers and CFO's.

We are all working hard to find more to 'be' our great women candidates, we need to be working equally hard to ensure that they have great women eager to 'support' them and ensure they are successful.

It's an exciting time to be a Liberal - it's essential that women feel at home in our 'movement' and see themselves as an essential part of a Liberal victory in 2015.

Carolyn Bennett M.D.,  
M.P. St. Paul's  
Liberal Critic for Aboriginal Affairs, Chair, Liberal Women's Caucus



## **The Ontario Women's Liberal Commission**

The Ontario Women's Liberal Commission (OWLC) represents and promotes the interest of women within the party. We aim to encourage the active participation of women at all levels and we work to ensure that policies and legislation do not discriminate against women.

As a joint provincial and federal organization we have the privilege of working for women at two different levels of government.

Among the things we do are:

1. Represent women within the party on the executives of both the Liberal Party of Canada Ontario (LPC(O)) and the Ontario Liberal Party (OLP).
2. Recognize women's clubs within the province.
3. Present the Marian Maloney and Donna Dale awards to honor women's involvement in the party.
4. Identify, encourage, and support potential women candidates.
5. Fundraise through the Judy LaMarsh Fund (Liberal Party of Canada) and the Margaret Campbell Fund (Ontario Liberal Party) to assist women candidates financially by making donations to their campaigns.
6. Provide seminars, workshops, and mentoring to assist women within the party.
7. Discuss and promote issues of interest to women.

Membership of the OWLC consists of all women who are members in good standing of LPC(O) and/or OLP, as defined by their respective Constitutions.

## **How and Why to Start a Woman's Club in your riding**

A woman's club can be an excellent way to get more women involved in your riding. According to Liberal Party of Canada data, during the 2011 election only 22% of Liberal members were women. To increase this percentage we need to engage women and involve them in our organization from the grassroots so that we can train and guide them through our organization. A local women's club is an excellent starting point for getting involved in the political process!

For those interested in starting a women's club in your area here is a guide to get you going. Please keep in mind that in Ontario women's clubs are jointly federal and provincial, so there are steps involving the OWLC as well as The National Women's Liberal Commission (NWLC).

A club may be formed when a group of at least 10 women Liberals hold a founding meeting, elect an interim executive and adopt a constitution or set of bylaws. Please note however that to be recognized by the OWLC and NWLC a club must:

- be duly constituted at a formal meeting and must have at least 25 members in good standing;



- submit a letter asking for recognition to the OWLC with the following documents attached:
  1. the minutes of the founding meeting indicating the date, place and names with address and telephone numbers of the people attending the meeting
  2. a membership list with the names, addresses, telephone numbers and ideally emails of the members and the executive
  3. the constitution or bylaws of the club (please see 11.2.2 of the OWLC constitution for a basic list of items that the constitution must contain).
  4. a letter signed by the club president stating that all members of the club are in good standing of the Liberal Party of Canada and/or the Ontario Liberal Party.

The OWLC will review the documents and will forward a letter of recognition to the club and the NWLC liaison at the National Party offices.

To maintain its standing the club must each year:

- hold an annual meeting for the purpose of electing an executive;
- forward the club's original constitution/bylaws on formation and any amendments that might be made from time to time, to the OWLC and the LPC liaison of the NWLC;
- forward to the OWLC and the NWLC annually: minutes of the club's annual general meeting and a list of both executive and membership.

Please note, in ridings where a women's club exists the LPC(O) constitution (Article XII 4. (c)) stipulates that the president of the women's club sits on the executive committee of the EDA.

If you need any assistance or have any questions, please contact the OWLC at [owlc@lpc.ca](mailto:owlc@lpc.ca)

## **About the Ontario Young Liberals**

Representing individuals between the ages of 14-25, the Ontario Young Liberals (OYL) play an important role in both the Ontario Liberal Party, and the Liberal Party of Canada.

The OYL and Young Liberals everywhere have become the voice of youth in our party, the voice of change, and the voice of renewal. We are a way for interested youth to become actively involved in politics and we provide a forum to effect meaningful change. We are an organization made up of youth from across Ontario, who are organized into both Riding Clubs and Student Clubs.

The OYL Executive works with club members to plan events throughout the year, to organize volunteer opportunities with local members and candidates, to formulate policy for submission to the federal and provincial parties, and to facilitate cooperation between Young Liberals. There are so many ways to get involved with the OYL. You could attend one of the OYL signature annual events participate in the policy process, volunteer on a campaign, join an OYL committee, join a club (or start a club) in your riding or on your campus, or come up with your very own initiative.

The OYL is a membership-driven organization, and so we want you to keep in touch. Feel free at any time to contact any of the OYL Executives about anything! Also, we hope you'll be a part of our Facebook Page, and follow us on Twitter for the latest OYL-related updates.

### **Why Have a Youth Club?**

- Youth in your riding are the future leadership of your association – train them!
- Youth are great volunteers for EDA events
- Youth bring fresh ideas to the policy table
- Youth provide excellent outreach opportunities for members/candidates
- Youth are great campaign volunteers and have large networks of other youth that can volunteer (and need volunteer hours for school)
- Youth are eager to help on campaigns
  - They're great canvassers but are also interested in leadership roles

### **How to start a Young Liberals Club in your EDA**

You will need to identify at least 10 youth (ages 14-25) to start an OYL Club in your riding. Here are some of the ways you can do that:

#### *Within the Riding Association*

- Identify active youth
  - Use membership lists; past and present
- Ask the active youth to leverage their contacts and provide an incentive for them to get

their friends involved (lunch with the candidate/member, Liberal swag, etc.)

- Contact all your members for assistance. They likely know active, interested youth

### *Outside the Riding Association*

- You can recruit youth from:
  - Local high schools (high school students need volunteer hours to graduate – your association can provide these!)
  - Post-secondary campuses
  - Existing local organizations (youth, religious, and cultural)
  - Municipal politics
  - Recreation and Community Centres
  - Youth- or family-centric events and festivals

Involving the local member or candidate can help get the attention of youth.

*Contact the OYL Executive at any time for assistance!*

### **How to Maintain a Youth Club**

- Host youth events in your riding with your candidate/member
- Provide a youth rate for riding association events and fundraisers
- Provide them with a small budget so they can host events and fundraisers
- Help them attend Party conventions by paying for delegate fees or accommodations, and arranging car pools
- Youth want to be involved in all parts of a riding association and campaign: give them opportunities to showcase their skills

### **How the OYL can help**

- Connect you with youth who have reached out to us but haven't contacted your riding association
- Help you recruit youth at local EDA events
- Provide recruitment materials (posters, literature, etc.)
- Connect with other OYL clubs in the area to identify potential members
- Provide templates for club documents (constitution, meeting scripts, etc.)
- Help facilitate a founding meeting
- Provide club resources (website, Facebook page, Twitter account, recruitment materials)

### **Your point of contact with the OYL**

Contact Najva and your regional coordinator with any questions you have. We're happy to help.

Najva Amin, Riding Director, [namin@oyl.org](mailto:namin@oyl.org)

#### Southwest Region

- TBD

#### South Central Region

- Chris Yendt, South Central Regional Coordinator, [cyendt@oyl.org](mailto:cyendt@oyl.org)

#### Northern Region

- Mike McNeice, Northern Regional Coordinator, [mmcneice@oyl.org](mailto:mmcneice@oyl.org)

#### Central Region

- Shaunt Tchakmak, Central Regional Coordinator, [stchakmak@oyl.org](mailto:stchakmak@oyl.org)

#### Toronto Region

- Alia Hussain, Toronto Regional Coordinator, [ahussain@oyl.org](mailto:ahussain@oyl.org)

#### Eastern Region

- Daniel Nowoselski, Eastern Regional Coordinator, [dnowoselski@oyl.org](mailto:dnowoselski@oyl.org)

## **Best Outreach Practices, Ron Hartling**

### **OUTREACH BEST PRACTICES AT THE RIDING LEVEL**

#### **What is outreach?**

Outreach is any activity undertaken by a riding association (EDA) for the purpose of connecting with and earning the confidence of the larger community in its riding beyond known Liberal members and supporters.

#### **How does outreach differ from traditional campaigning?**

Given that governments are increasingly opting for 35-day writ periods (the legal minimum), there is simply insufficient time for local campaigns to change individual voters' minds about Party preference. Hence campaigns necessarily focus on marketing the person of the Candidate and identifying/getting out the Liberal vote. Campaigning is and should be highly disciplined, under the leadership of the Candidate's chosen campaign manager.

Outreach, by contrast is about changing hearts and minds. It's about gradually and respectfully building trust, mutual understanding, goodwill and relationships, demonstrating to our fellow citizens that Liberals truly share their values, care about the same issues and offer real solutions. Outreach is the core job of the riding association between elections. It has to be done locally, by people meaningfully engaging with people. Prospective candidates can and should be involved, but the focus should be about issues and concerns rather than them personally. Developing and implementing an outreach strategy should not wait on having a candidate.

Outreach is empowering. Individuals should be encouraged to propose their own ideas about how best to reach segments of the community with which they have some familiarity and should be given the scope and support to try those ideas. Many small initiatives will often make more impact over the long term than a few large ones.

#### **Who should we target?**

Everyone and anyone in our community who is not already a confirmed Liberal! Of course, we need to prioritize in order to make best use of our limited resources. An important starting point for outreach planning is poll-by-poll analysis of voting patterns in previous elections. For a great tool in this regard, try <http://earth.smurfmatic.net/canada2011/polls>. Ideally, those results should be coupled with socio-economic/demographic data that may reveal the segments of the community with whom the Liberal message failed to resonate in recent elections.

#### **How do we approach target segments?**

We start by listening. Identify and speak with both opinion leaders and ordinary citizens from each target segment to learn the circumstances that define that grouping, their concerns and the issues that matter to them. Only then, start to consider how federal Liberals might be able to help and possibly champion those issues in a way that aligns with Liberal values. Finally, visibly demonstrate those values in action through appropriate outreach activities.

## **Don't overlook the non-voters!**

Connecting with and understanding non-voters should be a priority when engaging in every segment of the community. In most ridings, they represent the largest single bloc of eligible voters. Unlike confirmed Conservative, NDP and Green voters, they don't have to be convinced to change allegiances; just that it's in their best long-term interest to get out on Election Day. The first party to figure out how to effectively engage this group will have a huge advantage in the next election. Don't let it be your opponents who do.

## **Types of outreach activities**

The following is a categorized list of some of the outreach activities which we have undertaken in Kingston and the Islands since 2009. The list is in order of what we found to be increasing power and effectiveness in our ultimate objective of influencing votes:

### **1. Be visible in your community**

- Encourage your members to buy and wear a common item of distinctive Liberal clothing (e.g. red Liberal polo shirts from <http://www.boutiqueliberal.ca/>);
- March as a group in events such as the Canada Day parade with as many members as possible wearing Liberal colours (easy on Canada Day);
- Have Liberal tables and booths at community events, with information and an approach tailored to each event's theme (e.g. Canada Day, Pride, country fairs) and include an attraction (e.g. on-the-spot button making) which will generate line-ups that provide your candidate/MP a great context for engaging visitors in positive conversations [detailed guidelines available from outreach@kingstonliberals.ca].

### **2. Identify and connect with all manner of community groups**

- Build a list of all existing groups of which you and your members are aware;
- Note which of your members already belong to which groups and encourage them to be Liberal ambassadors to and information collectors on those groups;
- Encourage members to join groups on which we currently have to representation;
- Purchase riding association membership in key groups (e.g. the Chamber of Commerce) which afford especially good networking opportunities;
- Overtly contribute to and support the activities of groups whose goals best align with Liberal values

### **3. Be of visible service to the community**

- Get members out in a Liberal-clad group to participate in community service activities (e.g. food bank drives, park and street clean-up, etc.);
- Directly engage in social action activities (e.g. hosting/serving meals to the poor)
- Participate as a group within existing community service organizations (e.g. building/maintaining low-income and cooperative housing).

### **4. Engage in political activism**

- Identify issues that matter to key segments of your community which speak to Liberal values and have a federal dimension;
- For each such issue, find an existing non-partisan citizen activist group and get involved as described below under "Liberals as activists";
- If no effective citizen group exists, consider helping to create one (our experience is that working through a non-partisan group can be more effective in the long run than taking the lead ourselves as an overtly political organization);

- Work with the Liberal Critic under whose portfolio the issue falls as well as the formal Party policy process to create an approved Liberal policy position that will be seen by those concerned about the issue as a long-term solution.

### **Liberals as activists**

When you first attend meetings of existing issues-based citizen groups, you may be nonplussed to find that most of your fellow attendees are NDP or Green voters/supporters. That's because Liberals have, by and large, forgotten how to be activists. They may be surprised to see you for that reason, but you will almost invariably be welcomed. If the cause is one that you as a Liberal can support, wear buttons, join in protest marches, be helpful, get other Liberals out to join the group and, above all, be the conduit to bring Liberal resources such as parliamentarians to bear on advancing the cause. In short, be an activist. All of these actions serve to earn trust, public visibility, media attention and a sense of Liberals being relevant to the community. If you are successful and your riding is in the fortunate situation of the Liberal candidate being the only viable alternative to a Conservative, many of not most of your fellow activists will cast their ballots strategically for the Liberal candidate in the next election. Strategic voters can constitute your margin of victory in a tight race, as evidenced by our success in Kingston and the Islands.

### **A word of caution**

Community groups try to be non-partisan, focussing on the issue around which they coalesced rather than on the fortunes of any one party. Fortunately, more often than not, that issue requires opposing actions of the Harper government. In those situations, it's very important to refrain from proselytizing. If you are seen to be there merely to exploit their concern about an issue for partisan advantage, you will do more harm than good.

### **Side-benefits from community outreach**

By engaging your members in tangible actions that put Liberal values in action, do good in the community and do what they see as the right thing, you are reinforcing their commitment to the Liberal Party. Stretching yourselves to put on events and engage in activities for which you may not have as many volunteers as you would like tends to result in new volunteers coming forward. Youth in particular are natural activists and crave meaningful volunteer activities. Fail to provide those opportunities and you will lose them. An active and successful outreach program grows your membership, your volunteer cadre and your donor base, giving everyone good reason to take pride in being Liberal.

Updated March 8, 2014

## **Objectives of the Aboriginal Peoples' Commission (Ontario)**

ONTARIO – ABORIGINAL PEOPLES' COMMISSION 2014/15

As some members of the Liberal Party of Canada know, for approximately 5 years, the Aboriginal Peoples' Commission entered a period of inactivity. Unfortunately, our timing for such dormancy was not the greatest.

It was during this time frame the Conservative Party rose to power, formed Government, and began its systemic erosion of Treat Rights, and began to establish an infrastructure within government to make it impossible to us to navigate and reduced or eliminate key sources of revenue vital to survival in some of our communities. As a result, approximately 2 ½ year ago, a small but vocal group began the process of re-constituting the APC, re-establishing linkages and partnerships, and re-building the critical mass needed to make a significant impact in some ridings. New members have stepped forward to continue the building process, but we need more...more people, more funds...This is where you come into play. As National, Provincial, Regional and Local level executive, you have some of the background knowledge and influence to assist us in helping the Aboriginal Peoples' Commission continue its important work and making the positive change necessary to see a difference.

Three key words have come to the forefront as the APC and Ontario APC began the Refounding Process....those three words are...REBUILD...REBOOT...REBRAND. Rebuilding, we have to encourage those individuals who have supported the LPC and APC but left for whatever reason...it's time to come home. We need to embrace new technologies and social media to reach out to the next generations of APC members, and final we have to rebrand our image as we are no longer the same ole party but we are one that is inclusive and responsive to the Indigenous Peoples of Canada as well as to all members of society.

### **Highlights**

The key highlights or lowlights depending on your point of view for the Aboriginal Peoples Commission of Ontario focused in two areas. 1. Was the first meeting and election of an Executive in May 2012 in Toronto. Although the number of individuals in attendance was small, we were and continue to be a determined group. 2. Increased number of individuals stepping forward to be make the APC-Ontario a major force within the province.

1. During the Liberal Party of Canada – Ontario Biennial Convention in May of 2012, the APC-ON held their own Refounding Meeting. Unfortunately, the number of individuals in attendance was not what was hoped. With the lack of appropriate funding to encourage attendance and specifically promote the meeting contributed to the lack of attendance. In addition, the National APC had just reconstituted itself, and the APC-ON was the first Regional meeting to be held...therefore making us the "guinea pig". The election saw three of the Executive positions filled with Steve Vanloffeld, Edward Martin and Douglas Pawis assuming regional representation position. I would be remiss if I did not acknowledge the Interim President Ms. Jaime Koebel and the support and guidance she provided each of us during this process. Subsequent to this meeting Doug Pawis could not continue in his role with APC(O), Steve Vanloffeld was selected as President, and joining our energetic little team was Laure Fournier and Cynthia Wesley-Esquimaux and finally Edward Martin in addition to continuing with the APCO was appointed to the National APC as Vice President of Membership & Organization.
2. Now if that wasn't enough change for you...here we go...Steve Vanloffeld stepped down as APCO President because of work and school commitment but remains rep for Toronto



region...as a result, the remaining APCO Executive Appointed Edward Martin as Interim President, and yes he remains National VP Membership/Organization – APC...is everyone still with me...Laure resigned from APCO due to work commitments, Cynthia vacated the Central region's rep position as she moved to Thunder Bay and now acts as our Northern Region contact...joining us now on the Executive are Greg Brant Castellano – Eastern Rep., Robert Wood - South Central Rep, Ronda Evans – Womens Rep, Fizul Sima – Central Rep...and we have some members who I have affectionately called "Free-Range Reps" Kimberly Aherne, Alexander Labie, Jules-Jose Kerlinger, Todd Ross...and let's not forget the support from the APC in-Province members, Chad Cowie, Glenn Wheeler and Naomi Sayers....and further to these people are a group of 25 people who are ready willing and eager to step up and help whenever we need. We have come a long way from our first meeting in May 2012 and we will continue to grow and become a major force within the LPC.

## Objectives

- To increase the opportunities for Liberal Minded - Indigenous Proud individuals within Ontario to have their voices heard in an impactful and meaning manner within the political structures federally, provincially and municipally
- To increase the opportunities for Liberal Minded – Indigenous Proud individuals willing to take a more active role in politics as candidates in future elections federally, provincially and municipally
- To ensure the longevity and stability of the Ontario Aboriginal Peoples Commission through increased memberships and fundraising initiatives

## Mission Statement

Through inclusivity, empowerment of self-identity and political activism, the Ontario Aboriginal Peoples Commission will work together with other liberal minded allies to improve the quality of life for Aboriginal peoples and the coming generations. We will lead positive social and political change and deliver value to our Communities through information, support, research and advocacy.

## Keys to Success

The key to the success of the Ontario APC is the partnership development that must occur across all political levels with those who are like-minded in philosophy and dedicated to the never ending driving focus. This will never be more prevalent than in the next federal election. Nationally there are 64 EDA where the election results could be swung based on the "Aboriginal" vote. The number of those key EDA's that are in Ontario 9. The Ontario APC is prepared to assist the Ontario EDA in outreach to the Aboriginal population within their EDA. This would include basic cultural training and etiquette when speaking with a community Elder, appropriate engagement processes within the community, specifically for the candidates – "How to Promote the Candidate Aboriginal style" and finally, understanding the Two-Row Wampum and the Vote. All will play vital roles as we work towards ensure a Liberal Government for 2015.

For further information please contact

**Mr. Ted Martin – Interim President, APCO**  
**Cell Ph: 289-700-0892**  
**E-mail: [aboriginal.and.community@gmail.com](mailto:aboriginal.and.community@gmail.com)**



## **How to write your own EDA Newsletter, Tristan Joseph**

As we start to get ready for the next federal election, it's important to regularly engage with our local Liberal members. Engagement means a few things: getting people out to events as volunteers or attendees; helping them feel like they're a part of their local riding association; letting donors know what ridings are doing with their funds (those all-important words accessibility and transparency); and, at the end of the day, making sure people care about politics. While there are a number of different ways your riding can engage its members, E-newsletters are one of the most common.

But starting an e-newsletter may seem difficult for a few reasons. First, what do you put in a newsletter? Second, how do you put together a newsletter? Third, how do you send it out?

Here are a few ways to make that process easier for everyone – whether you have a communications pro in your riding or not.

1. **Determine how often you want to release your e-newsletter.** Start with sending it out quarterly or every other month. Once you have that process in place for at least six months, consider producing one more often if you have enough material and time.
2. **Develop a communications plan for your riding.** Look ahead throughout the year to see what's happening in your riding, your community, LPC(O) and LPC. This will also help you develop content for your Facebook page, website and Twitter feed. Sit down for half an hour with your board and brainstorm things you want to cover in your newsletter. If you find content from another source you would like to include, get permission to reproduce or link to the article.
3. **Outline sections for your newsletter.** There's no need to recreate the wheel every time you do a newsletter. Sections can be profiles on volunteers, board members, high profile people in the community who are working in areas of interest to Liberal readers, community events, riding events, LPC events and policy updates.
4. **Photos take up space and make your newsletter look interesting.** Anyone with a camera or smartphone can take photos that are good quality for e-newsletters. Include a mix of posed pictures and candid. Ask people to take photos at events and send them to you. Make sure you respect privacy and copyright laws. Have people sign consent forms or send an email giving the riding permission to use their image. In Canada, photos belong to the photographer; so, you need permission to use them.
5. **Keep it engaging.** Tailor it to your riding and your members. Choose the best content and don't overload your newsletter. Poll them at least once a year to see who's reading it and what they like (and don't like) to read.

Finally, you have a few options to put your e-newsletter together and send it out. Use Liberalist Email Blasts. The online training session has instructions on how to create an email, make a template and insert images.

Or, use an email program like MailChimp. This is free for less than 2000 subscribers and you can customise yours using the Liberal Party of Canada Visual Identity Standards Manual: <http://www.liberal.ca/newsroom/official-graphics/>.

One last tip. Work on your e-newsletter in advance. If you're working on the April newsletter in February, you won't have to worry about scrambling to finish it.

## **What is Victory Fund & how does it help your EDA?**

### **Engagement starts here**

Building trust and policy that Canadians care about takes time and money. The Victory Fund is the simplest and most affordable way to support the Liberal Party and helps us pursue our ambitious goals both nationally and locally.

### **The Victory Fund works like this:**

- You make small, monthly contributions of \$10 dollars or more;
- Part of it goes to the national office and part of it goes to the EDA of your choice.
- Your personal contributions not only helps the Liberal candidate in your EDA but also allows the party to develop policy that will help build a better Canada and share our vision from coast to coast to coast.

**It is important to inform your EDA members that there is a year-end tax credit for their Victory Fund and other donations. Victory Fund can cost only \$2.50 per month, if this is there only contribution, that's less than a coffee and a muffin, to help build the Canada you want.**

To download Victory Fund forms for your members or to have them sign up online, please go to: <https://action.liberal.ca/en/VictoryFund>

## **FUNDRAISING/EVENT IDEAS**

- Shared regional fundraisers – This idea is a fairly old one, but an important one nonetheless. By sharing the logistical load, you can spend more time selling tickets and increasing the revenue gained. It also builds teamwork amongst your area EDAs.
  - Example: Red Tie Gala, Hamilton
- Unconventional event ideas – by now, everyone has gone to a cocktail/breakfast/lunch/dinner fundraiser with speeches and questions and answers. There are different ways to raise money that are easier for people to attend and more fun for guests.
  - Example: Christmas membership drive; those attending Christmas party receive meals in exchange for renewing their membership.
- Incentivize supporter registrations – offer an incentive to those who sign up the most supporters. This could be as simple as a free ticket to the next high-dollar fundraiser.
- Victory Fund Events – plan an event where the price of admission is becoming a Victory Fund member of your EDA. Whether it is a pub night or inviting members to speak with an attending Liberal Member of Parliament, it is a sure way to build up your Victory Fund membership.
- Town Hall Meeting – plan a public town hall event with an engaging guest. The event is free to the public and the aim is to recruit new members to your EDA.
- Participating in Charitable Events – get your EDA involved with a local charitable event. Whether it is having a Liberal team in a local clean-up effort or participating in the Terry Fox Run, it is important for community outreach to be involved in the community as a EDA Liberal team.

## **FAQs about the Candidate Selection Process**

### **Who sets the nomination meeting date?**

The Provincial or Territorial Co-Chairs decide on the dates for nomination meetings, but EDAs have an important role to play in how soon a meeting can take place in. Before a meeting can be called, your EDAs must:

- Be registered with Elections Canada;
- Have resolved all redistribution responsibilities, including assets/liabilities transfers among affected joining EDAs, to the satisfaction of the National Director;
- Have conducted a thorough Candidate search process including documented evidence of a thorough search for potential candidates who are female and who are reflective of the demographic and linguistic makeup of the local electorate;
- Have met any thresholds that may be relating to EDA membership, fundraising and organization as determined by the Provincial or Territorial Co-Chairs; and
- Have one or more Qualified Nomination Contestants.

### **What is the Candidate search process?**

A thorough candidate search will ensure that the Liberal Party of Canada has a robust and high-caliber group of Nomination Contestants in all 338 ridings across Canada. Before a Nomination Meeting can be held, EDAs will need to show their Provincial or Territorial Co-Chairs documented evidence of a thorough search for potential candidates, specifically female candidates, and candidates who reflect the demographic and linguistic makeup of the EDA's electorate.

### **What are the thresholds that must be met by the EDA before our meeting can be called? Who will notify us?**

There will be a set of requirements placed on each EDA, which must be met before a Call of a Meeting can occur. This include:

- Membership numbers
- Fundraising (specific minimums on back balances, and Victory
  - Fund and/or Laurier Club members)
- Organization (individuals trained on Liberalist, election readiness, etc.)

### **A potential candidate has contacted the EDA about seeking the nomination. What do we do?**

Excellent news! You can direct them to: <http://www.liberal.ca/open-nominations/>

They'll be required to fill out a form, which will directly alert their PTA Co-Chairs that they are seeking the nomination. They will then be sent the required documents to apply to become a registered Nomination Contestant. If they have inquiries, they may contact [nominations@liberal.ca](mailto:nominations@liberal.ca).

### **A potential candidate has requested a membership list from the EDA. Is this possible?**

The list of people who are entitled to receive the list of Members is covered in the National Membership Rules, Section 3.1. Unfortunately, only Qualified Nomination Candidates who have successfully completed the green light process are entitled to the data, not Potential Nomination Candidates.

**An EDA Executive Member of has said they want to run as a Candidate. Is this allowed?**

Of course! However, be aware that some PTA Constitutions require EDA Executive Members to resign or take a leave of absence as a member of the EDA Executive if they indicate their intent to seek the nomination as a candidate of the EDA.

**Does a donation to a Nomination Contestant qualify for a tax receipt? And does it count towards an individual's annual donation limit?**

Donations to Nomination Contestant's campaigns do not qualify for tax receipts. When an individual makes a contribution towards a Nomination Candidate's campaign, it counts towards their annual donation limit (\$1200) for their Electoral District Association.

**Will the EDA President be notified when contestants become qualified?**

Yes. Once a contestant becomes qualified, EDA Presidents will be notified, as contestants will have access to membership data through Liberalist and can start communicating with the Membership. The names of Potential Nomination Contestants who have requested forms will not be shared.

## Role of the past candidate in the EDA

(By Mark Jessop, President, Barrie—Springwater—Oro-Medonte)

According to the standard EDA constitution of LPC(O), the last person to run unsuccessfully for election in the riding has an ex officio seat on the EDA executive board. This means that by reason of their office, that person automatically has a seat at the table. Unfortunately, the EDA constitution does not define what that person's role is within the EDA. Let me make some observations and suggestions.

A good start would be to draw a portrait of the different types of past candidates. I have narrowed it to three general types: the "**elder statesman**", the "**ghost**", and the "**activist**". The Ghost is the easiest to describe. That would be the person who, after failing to win the seat, walks away from any party and EDA involvement. The Elder Statesman, is the past candidate who failed to win the seat, who is not interested in running again, but who wishes to assist the EDA by sharing their experience running a campaign. This person will sometimes become a mentor to the future candidate and the EDA executive. I'll return to the third type in a moment.

A second point is the matter of campaign financing. In ideal conditions, the EDA had a full war chest and was able to fully finance the campaign. We all know that such is rarely the case. However, one of the goals of the EDA is to raise money to finance an electoral campaign. Before an election, the executive normally signs a Memorandum of Understanding (MOU) with the candidate setting out the transfer of funds to the campaign, including the pre-writ expenses towards the campaign. This is a crucial matter between the EDA and the candidate, and will set the tone for the relationship between the two after the election.

According to Elections Canada (EC) the campaign debt has to be resolved within 18 months of the election, and is the responsibility of the candidate. The EDA does not assume the campaign debt, but part of the MOU often contains provisions about the kind of assistance the EDA will provide the candidate to resolve the campaign debt. There are several options, but remember that by 2015, the per-vote subsidy will be gone. The candidate will not receive federal money based on the number of votes received during the election. For example, in 2011, the subsidy was for \$2.04 per vote. Each candidate above a certain threshold of votes received a partial refund for their campaign expenses. In the next general election, there will not be any subsidy. There will therefore be an increased need for fundraising before, during, and possibly after the campaign. In my experience, EDAs have offered to cover the interest for the campaign debt while it was being eliminated, or they organized specific debt-retirement fundraising events. In some fortunate cases, there was no campaign debt. It is key to remember that the campaign debt remains the responsibility of the candidate. Accurate accounting, auditing and filing of campaign finances remain crucial to resolving the campaign debt as quickly as possible.

This brings us back to the third type of past candidate, the activist. This is the candidate who failed to win the seat in the previous election, but has decided to carry on and try to get the nomination again next time. While a past candidate is perfectly within their right to seek the nomination, this does possibly present some conflict of interest issues (ex: perception that the EDA may not be running an open and unbiased nomination race). For this reason the direction of the EDA executive will be essential. The EDA President, on behalf of the board, should guide the past candidate in these matters and the EDA on the whole, and, with respect to individual positions (ex: VP Membership, CFO), is responsible for overseeing the association's business and protocols. At no time should any nomination contestant, including the past candidate, be



seen directing or circumventing the procedures or officers of the association, and it is the duty of those officers to act in a fair and unbiased manner toward all nomination contestants.

As EDA president, you have to assert the EDA's authority, but you must, however, use your diplomatic skills to channel the energies of your past candidate to assist your EDA in achieving your main goals: promoting Liberal values, raising funds, and getting a Liberal elected to the House of Commons. You must channel your past candidate's strengths in a manner that do not give that person an unfair advantage over other potential candidates, yet make sure their strengths are used to increase your membership and fundraising. It is best to avoid giving the past candidate a table position, but they can be assigned a committee task that will take advantage of their name recognition and status in the community. This will also make it easier for them to withdraw from executive work once the nomination process is launched as their departure would not leave a void in the executive at a very busy time. You must, however, be able to monitor their work to ensure fairness and that the goals of the EDA take priority over potential electoral ambitions.

In the four-year window between elections, you can expect four, possibly five AGMs in your riding. The past candidate will remain, at least in an ex officio capacity. In that period there may be considerable change in the make-up of the executive, including the position of president. Under normal conditions, you will also remain on the executive for at least one term as ex officio past president. You never know what 4 years will bring. A past candidate can be very active in the year following the election if it is necessary to eliminate the campaign debt. Life can catch up with political ambitions and dampen them. Ideally, you and your past candidate will see eye to eye, and will be able to navigate the years between elections to the benefit of the Liberal Party. The best way to proceed is to set out clear rules of authority. The past candidate is answerable to the EDA executive (as the body that reports to EC and LPC/LPC(O)) and should consult with the association and or the president before taking any public action associating themselves with the Liberal brand or association name (ex: letters to the editor). Given that the president's and the past candidate's goals should at least parallel each other, it is in both their interest to cooperate. The president, however, has to be able to put his foot down. This is done in collaboration with the executive and motions passed by the executive, if necessary, to limit some actions of the past candidate. Ultimately, the relationship with the past candidate must accord itself with the EDA's stated goals and decisions.

One final note regarding the past candidate's role on the board of the EDA. As the nomination period approaches, and the search for candidates gets under way, the past candidate should take a leave of absence from the board if they intend or consider seeking the nomination as should any member of the board who intends on seeking the nomination as well. Once declared, they are to follow LPC(O)'s guidelines and should be accorded the same status as any other nomination contestant with respect to EDA activity. This is to ensure fairness and to avoid giving the past candidate an unfair advantage over other potential candidates. If ever the past candidate does or says anything that could be detrimental to a fair candidate selection process, he or she must be called on it by the president, and the board must be made aware of such actions. LPC is committed to open nominations, and the EDA executive and its president should not be caught in a conflict of interest favouring the past candidate.



## **ANNUAL GENERAL MEETINGS – How to set & chair an AGM**

### **Process for holding an AGM:**

- Contact LPC(O) to discuss a suitable date for the AGM. Must be held within 15 months of the previous AGM;
- LPC(O) must approve date and ensure that enough time is given to provide members a minimum of 28 days' notice of the meeting
- Once the date has been approved the association must provide the outreach officer with the time and location of the meeting. The AGM must be held within the Electoral District and must be accessible.
- LPC(O) will prepare and send out the notice.
- Notice will include: date and time of meeting; address of location; e-mail address for the organizer of the meeting; constitution listing all executive positions; the deadline to submit an intent to stand for a position; the membership cutoff date to be eligible to vote at the meeting.
- Notice will be sent to all current members
- All intentions to stand for a position must be submitted two weeks prior to an AGM; if none are received, positions can be nominated from the floor.
- Only those who have signed up a week prior to the AGM can vote on contested executive positions.

### **The AGM:**

- Your LPC(O) outreach officer will assist with the facilitation of your meeting by providing a template agenda (see page 16) and chair's script.
- Chair and returning officer for the election of Executive are appointed by LPC(O)
- In the event of a contested meeting, your outreach officer and LPC(O) will provide all the necessary material to the appointed chair and returning officer
- Candidates for contested positions may request a membership list after they sign a confidentiality agreement with LPC(O).
- Quorum for the AGM is stated in the EDAs constitution. Constitutional amendments must be forwarded 48 hours in advance to the President and LPC(O). Constitutional amendments cannot be taken from the floor. Amendments must have a two-thirds majority to pass

### **Post-AGM:**

- President will forward a list of the new executive and all members of the EDA.
- Make the necessary changes with Elections Canada and LPC(O). Complete the Elections Canada form "Report of Changes to the Information in the Registry of Electoral District Associations"
- Provide LPC(O) with an email address for President to be posted on the LPC(O) website.

## **A SUGGESTED EDA ANNUAL GENERAL MEETING AGENDA TEMPLATE**

### **Annual General Meeting of the ..... Federal Liberal Association (Include Date, time and Location)**

- 1.** Welcome and President's Remarks
- 2.** Approval of Agenda / Additions to Agenda
- 3.** Adoption of previous AGM meeting minutes
- 4.** Remarks from Regional President
- 5.** Introductions of Special Guests (Perhaps a Victory Fund Presentation or greeting from the Candidate)
- 6.** Reports
  - Report from the President
  - Report from the Treasurer (to include a financial report)
  - Report from the Membership Secretary and VF Chair
  - Report from VPs and chairs of the Committees
- 7.** EDA's Strategic Plan review /coming events
- 8.** Constitutional amendments (LPC(O) official may chair this section)
- 9.** The election of officers and directors (LPC(O) Official shall Chair this section)
- 10.** Voting
- 11.** Announcement of results of Vote
- 12.** Other Business
- 13.** Adjournment

**Template for EDA Executive Meeting Agendas: (agendas should be included with the notice of meeting)**

1. Call to order
2. Confirm quorum
3. Approval of minutes of last meeting
4. Business Arising and status of action items
5. Membership report
6. Financial report
7. President's report
8. Correspondence received
9. Report from Committees
10. Other business
11. Date and time of next meeting
12. Adjournment

**EDA Meeting minutes should include**

Date, Time, Location of meeting

Names of those in attendance

Names of those who sent regrets

Time meeting called to order (and an indication if Quorum was attained)

Minutes should follow the order of agenda and clearly record any action items that may arise. Action items should be carefully outlined with the name of the member who will take care of and time frame to complete

Any spending or payment of expenses needs to be approved so there should be a record of all motion to authorize these actions.

\*\*\*\* All motions must be clearly detailed with mover and seconder\*\*\*\*\*

## **SAMPLE FUNDRAISING LETTERS**

Address1 (insert)  
Address2 (insert)  
City, Prov., (insert) Postal Code (insert)

November 15, 2012

Dear Fellow Liberal,

Just over one year ago, Canadian voters elected a Conservative government led by Stephen Harper. Our Electoral District Associations (EDAs) need your help to combat the regressive Conservative policies that are hurting Canadians. Your active involvement is needed now more than ever, as support from activists like you is vital to our Party's success.

With annual memberships set to expire soon I ask that you to continue to play an active role in our Party by strengthening your commitment to our values for 2013 by contributing monthly to our local EDA as a Victory Fund member. Through the Liberal Party of Canada's Victory Fund program, you will be assisting by: making a small monthly donation – a portion of which goes directly to our EDA for use in campaigns, events and communications. The rest of your contribution goes to our national office to develop policy and assist in administration costs.

As a Victory Fund member, you will also be eligible to receive a tax rebate of up to 75% of your total donation. Our next campaign is not for some time, and your small monthly contribution will add up significantly in the months to come. By donating monthly, you will contribute to the financial health of your riding as we look to the future and the next campaign.

**To support our (*Insert Riding Name*) EDA by contributing to our Victory Fund**, simply follow these three easy steps:

1. **Complete and Print the form attached.** Please be sure to include your email address so that we can stay in touch with you.
2. **Enclose the appropriate payment.** Please provide your credit card number, card expiry date, and signature on the form.
3. **Return these items to:** Liberal Party of Canada  
81 Metcalfe Street, Suite 600  
Ottawa, Ontario K1P 6M8  
or **Fax:** (613)235-7208

**To join online**, simply visit: <https://action.liberal.ca/en/VictoryFund>

Thank you for taking the time to consider supporting our local EDA by making a small donation every month. Every dollar counts.

Regards,  
(Your name here)



First Name, Last Name (insert)  
Address1 (insert)  
Address2 (insert)  
City, Prov., (insert)  
Postal Code (insert)

November 15, 2012

Dear (Insert first name),

On behalf of the Liberal Party of Canada (Ontario) and the Don Valley East EDA, I would like to take this opportunity to thank you for your contribution to the Victory Fund monthly donor program. This fundraising program is essential to maintaining a strong financial foundation for our Party, both locally and across the country. Through your continued support for our cause you are playing a key role in the future success of our Party.

As a Victory Fund member you are entitled to a free Liberal Party of Canada membership and this letter confirms that your membership has been automatically renewed for 2013. Victory Fund members constitute a considerable portion of our membership base and are essential to building strong EDAs across the country. For any questions regarding your Victory Fund membership, please contact your local fundraising chair, *(NAME)* at *(EMAIL)* or *(TELEPHONE)*.

Heading into the New Year, we also wanted to remind you that claiming your contribution to the Victory Fund program on your income tax filing may result in a rebate of up to 75% of your total donation. Your tax receipt for 2012 will be issued by the Liberal Party of Canada in January, well before tax season.

Thank you again for supporting the Liberal Party of Canada and contributing to the long-term strength of the Liberal family.

Regards,

*(NAME)*,  
Fundraising Chair –*(EDA Name)*

## **SAMPLE PRESS RELEASE**

### **Liberal MP Carolyn Bennett to hold public meeting at local First Nation**

*Party's aboriginal affairs critic to discuss issues, answer questions September 22 at Shawanaga First Nation*

Shawanaga First Nation (September 18, 2012) – Liberal critic for Aboriginal Affairs and Northern Development Dr. Carolyn Bennett will visit Parry Sound-Muskoka on Saturday to discuss issues facing First Nations peoples in Canada. The event, co-organized by the Shawanaga First Nation and the Parry Sound-Muskoka Federal Liberal Association, is taking place at the Shawanaga Recreation Centre.

"The issues confronting our First Nations have been widely ignored since the NDP and Conservatives did away with the Kelowna Accord," says PSMFLA president Leigh Beal. "The goal for this event is not only to present our alternative ideas, but to listen to the communities themselves about what they want to see happen."

Parry Sound-Muskoka is home to seven first nations – including Shawanaga – and two Métis groups.

"Despite the Prime Minister's rhetoric at the recent Crown-First Nations Gathering about resetting the relationship, the Conservative government has shown a total disregard for the rights of indigenous people," said Dr. Bennett. "In fact, this government seems to have a pathological aversion to consulting with anyone impacted by their 'made in Ottawa' decisions.

I am looking forward to meeting with members of the Shawanaga First Nation, local Métis groups, and residents of Parry Sound-Muskoka, to hear from them about the impacts of the Conservative government and to working together to develop solutions that will actually make a difference in their day to day lives."

Dr. Carolyn Bennett was first elected as Liberal Member of Parliament for the midtown Toronto riding of St. Paul's in 1997, under former Prime Minister Jean Chrétien. Over the last 15 years, Bennett has served as Minister of State for Public Health, as well as numerous critic roles. Currently, she is the Liberal Critic for Aboriginal Affairs and Northern Development and is chair of Liberals' women's caucus.

Dr. Bennett is also known locally for her work in addiction counseling and women's health. The event will run from 9 a.m. to 1 p.m. and will include a light lunch, Additional details can be found on the association's website at [www.parrysoundmuskoka.ca](http://www.parrysoundmuskoka.ca).

-30-

*The Parry Sound-Muskoka Federal Liberal Association is the local branch of the Liberal Party of Canada. For more information, contact (name) at (phone) or at (email)*

## Getting Started

### ***How to request an account***

**Requesting an account is easy. Follow the step-by-step process outlined below.**

1. Go to Liberalist.ca
2. Click the Request Access button in the top left-hand corner.
3. Read the ***Liberalist User Agreement (See Page 6)***.
4. Once you have carefully read through the terms of the agreement, fill out your details and check the box, assuring us that you have read the terms, conditions and limitations stated above.
5. The Liberal Party of Canada will then contact your riding president and candidate for authorization. We will create your account and you will receive an e-mail with a link to set up your account password and details. If you do not receive your account confirmation in five business days, contact assistance@liberal.ca.

The account approval process is designed to ensure that information in Liberalist is secure and that all users fully understand their responsibilities surrounding the use of Liberalist. It is important to note that the voter file contained in the system is an electronic version of the Elections Canada List of Electors, which is subject to the Canada Elections Act and to the scrutiny of Elections Canada. Users are expected to respect the sensitive information contained in Liberalist, use it only for approved purposes and fully comply with the rules set out by Elections Canada and the Liberal Party of Canada (LPC).

You can request one of three kinds of user profiles for your account. Each level has been designed for different positions within your campaign.

### ***Liberalist User Agreement form***

**The Liberal Party of Canada (referred to below as the "LPC") has developed a voter identification and contact management system which is called Liberalist. This system is to be used in accordance with the following terms and conditions and such other requirements that may be communicated to a person who is granted access to it:**

#### **Agreement Regarding the Use of the Lists of Electors**

*I, by completing required fields below, in consideration of the provision to me of access to Liberalist, do hereby agree and undertake as follows:*

- I understand the importance of protecting personal information on the lists of electors provided to the LPC and other personal information collected by the LPC and stored in Liberalist (all of which is collectively referred to below as —data).
- I understand and agree that I may use the data only for the purposes of communicating on behalf of the LPC with electors, donors and members of the LPC, including soliciting contributions and recruiting party members.
- I understand and agree that I will take appropriate measures to protect the confidentiality of the data and the personal information contained therein. I will not disclose the data to anyone outside the LPC.
- I understand and agree that I will not make or keep a copy of the data by any means, electronic or otherwise, and will return or destroy any copies that I may obtain once I have completed the task for which they have been provided.
- I understand and acknowledge that that the unauthorized use or disclosure of the data constitutes an offence under the Canada Elections Act and other laws.

- I understand and agree that access to Liberalist can be revoked or denied by the National Director of the LPC at any time and at his or her discretion and that his or her decision is final.
- I understand and agree that I will only use my unique personal login to perform authorized functions on Liberalist, and I will not permit the use of my personal login by, or provide it to any other individual, group or entity. In the event that I believe that my personal login has been obtained by any other individual group or entity, or otherwise compromised, I will immediately report this to the National Office of the LPC so that the authorization for the login may be cancelled.
- I understand and agree that the data contained in Liberalist, other than data obtained from lists of electors, is the sole property of the Federal Liberal Agency of Canada, and that any data that I may enter into Liberalist shall become the property of the Federal Liberal Agency of Canada, which it may use in accordance with law.
- I understand that the provision of data drawn from Lists of Electors is made solely for the use of the LPC at the federal level.
- I understand and agree that further requirements may be communicated to me by the Federal Liberal Agency of Canada at any time, and that my continued use of the login and of Liberalist shall constitute my agreement to such requirements.

### **Level 1: Basic User**

This account level is for new volunteers, door-to-door canvassers, phone bankers and data entry aides. This should be sufficient for most ordinary activities that volunteers will encounter day-to-day. Basic Users have access to modules such as Grid View, Scan Bar Codes and the Virtual Phone Bank so they can enter data and make phone calls with lists that are assigned to them. However, they cannot search for any individual or create a list of voters. They will only be able to use lists supplied to them by other users. This user level cannot export any information.

### **Level 2: Intermediate User**

This account has every feature available to Level 1 users, but it also can search for individuals in shared contacts and my voters and update their profiles. Level 2 users can also manage event participation for volunteers and attendees. Typically, this account will be used by volunteers with a more senior level of responsibility, such as a receptionist. Like Level 1, this account cannot export any information.

### **Level 3: Advanced User**

This account is designed for all of your campaign organizers, such as the campaign managers, volunteer co-coordinators, canvassing chairs, fundraisers, poll captains, technology co-coordinators, etc. This account allows users to do everything Level 1 and 2 users can do with the addition of the ability to create lists of voters or shared contacts. This account also has access to the analytics modules and can create and edit form letters, survey questions, scripts for phone banks and door-to-door canvasses. Level 3 users are able to request exports of information contained within the voter or shared contacts file.

### ***Logging in to Liberalist***

**In order to use Liberalist, all you need is a computer and an Internet connection. That's it. No other software is required because Liberalist is a web-based system.**

1. Liberalist is recommended and supported on the following Internet browsers: Firefox 3.0 or higher and Internet Explorer 7.0 or higher
2. Type <http://my.liberalist.ca/> in the address field of your Internet browser.



3. Enter the username provided to you by email by the Liberal Party of Canada. First time users will be asked to create a password.

4. After you click Log In, you will see the main menu. Be sure to enter or verify your contact information in My Profile. Your e-mail address will be used to reset your password in case you forget it.

**Note:** *If you do not have a username and password, visit [www.liberalist.ca](http://www.liberalist.ca) and fill out the online user agreement form. Your account will be validated by your riding association president or candidate before you can receive a user name and password.*

### ***Setting up your profile page***

**Help Center staff depend on the accuracy of the information you provide in your profile page when answering your support requests. If you do not fill out your name, address, and one phone number, this page will reappear every time you log in.**

1. Your profile must include your first and last name and your full address.

2. We use the email address found here to reset your password in cases where you have forgotten or compromised your password. Please be sure that the email address found here is up-to-date.

3. We strongly recommend including at least one phone number in your profile. The Liberal Party of Canada Help Centre operators will often use this number to more efficiently respond to your ***Support Requests***.

4. Click Save.

5. Update your profile regularly.

### ***How to reset your Liberalist password***

1. Type <http://my.liberalist.ca> in the address field of your Internet browser.

2. Enter the user name provided to you by the Liberal Party of Canada. The naming convention is `firstname_lastname`. Your username is not case sensitive.

3. Attempt to enter your password and click Login.

4. On the ***Access Denied page***, you will be prompted to click on the word here if you forgot your password. Click on the word here.

5. Enter your username and your email address and click Next.

6. If your account is validated, click Finish to send a link to reset your password to the email you provided.

There may be a small delay between requesting the reset and receiving the email.

7. If your username and email address are not validated, you can press Previous and attempt to enter a different username and email. For further assistance contact the LPC Help Desk by email at [assistance@liberal.ca](mailto:assistance@liberal.ca) or by phone at 1-866-574-5131.

### **Liberalist Main Menu**

After logging in, you will find yourself at Liberalist's **Main Menu**. Here, you will be able to navigate the many features and modules Liberalist has to offer.

The main menu is divided into two sections, **My Voters** (the grey tab) and **Shared Contacts** (the yellow-beige tab). Although they look similar, there is a very important distinction: **My Voters**, also called the voter file, contains the complete Elections Canada list of all registered voters in your riding. The voter file is used to create lists of voters and to track information about voters.

**Shared Contacts** contains those who have had contact with the Liberal campaign in your district (or your committee) and anyone you or your campaign adds to this section. You also have search capability for limited profiles of contacts of the Liberal Party of Canada across the country through **Quick Look Up**. Individuals do not have to be a registered voter, nor do they have to be a resident of your riding to be added as your electoral district's (committee's) contact. Shared Contacts is used to house information about your volunteers, activists, supporters, staff and anyone who wants you to communicate with them. Under Shared Contacts, you build your contact list, reach out to your volunteers/donors, and manage your campaign's activities.

### **Finding individuals & the profile page**

#### **Quick Look Up – Finding a Shared Contact**

**Quick Look Up (QLU)** is a feature that allows you to search your **Shared Contacts** for an individual. This feature is to help you look up individuals when they contact you.. You can search based on name, location, phone or e-mail. QLU uses `_SmartName` technology that automatically searches for variations in spelling and common nicknames (e.g. Rob, Bob, Bobbie, Robert, etc).

1. To search for a person, click on **Quick Look Up** in the **Shared Contacts Menu** and enter your search query in the relevant boxes.
2. After clicking the search button, the individual you are searching for may appear in a list at the bottom of the page. People that appear in this list are shared contacts. This means that you or someone else in the Liberal campaign has had contact with that person in the past.
3. If the individual that you are searching for does not appear in this list, select Search the **Voter File**. By clicking on Search the **Voter File**, you are searching Election Canada's list of registered electors.
4. If you find the individual you are searching for on the voters list, select the tick box that appears to the left of their name and then **Add to Shared Contacts**.
5. If you cannot find the individual you are searching for on the voters list, then select **Add New Person** and add their information in the boxes provided.
6. You will now be able to access that individual's profile, where you can modify and add information about them.

## Robert's Rules of Order Motions Chart

Based on *Robert's Rules of Order Newly Revised (10th Edition)*

**Part 1, Main Motions.** These motions are listed in order of precedence. A motion can be introduced if it is higher on the chart than the pending motion. § indicates the section from Robert's Rules.

§	PURPOSE:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?
§21	Close meeting	I move to adjourn	No	Yes	No	No	Majority
§20	Take break	I move to recess for ...	No	Yes	No	Yes	Majority
§19	Register complaint	I rise to a question of privilege	Yes	No	No	No	None
§18	Make follow agenda	I call for the orders of the day	Yes	No	No	No	None
§17	Lay aside temporarily	I move to lay the question on the table	No	Yes	No	No	Majority
§16	Close debate	I move the previous question	No	Yes	No	No	2/3
§15	Limit or extend debate	I move that debate be limited to ...	No	Yes	No	Yes	2/3
§14	Postpone to a certain time	I move to postpone the motion to ...	No	Yes	Yes	Yes	Majority
§13	Refer to committee	I move to refer the motion to ...	No	Yes	Yes	Yes	Majority
§12	Modify wording of motion	I move to amend the motion by ...	No	Yes	Yes	Yes	Majority
§11	Kill main motion	I move that the motion be postponed indefinitely	No	Yes	Yes	No	Majority
§10	Bring business before assembly (a main motion)	I move that [or "to"] ...	No	Yes	Yes	Yes	Majority

**Part 2, Incidental Motions.** No order of precedence. These motions arise incidentally and are decided immediately.

§	PURPOSE:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?
§23	Enforce rules	Point of Order	Yes	No	No	No	None
§24	Submit matter to assembly	I appeal from the decision of the chair	Yes	Yes	Varies	No	Majority
§25	Suspend rules	I move to suspend the rules	No	Yes	No	No	2/3
§26	Avoid main motion altogether	I object to the consideration of the question	Yes	No	No	No	2/3
§27	Divide motion	I move to divide the question	No	Yes	No	Yes	Majority
§29	Demand a rising vote	I move for a rising vote	Yes	No	No	No	None
§33	Parliamentary law question	Parliamentary inquiry	Yes	No	No	No	None
§33	Request for information	Point of information	Yes	No	No	No	None

**Part 3, Motions That Bring a Question Again Before the Assembly.**  
No order of precedence. Introduce only when nothing else is pending.

§	PURPOSE:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?
§34	Take matter from table	I move to take from the table ...	No	Yes	No	No	Majority
§35	Cancel previous action	I move to rescind ...	No	Yes	Yes	Yes	2/3 or Majority with notice
§37	Reconsider motion	I move to reconsider ...	No	Yes	Varies	No	Majority

## **LPC(O) GLOSSARY**

<b><u>LPC:</u></b>	The overarching term to represent the Liberal Party of Canada.
<b><u>LPC(O)</u></b>	The provincial wing of the federal party. The organization is largely responsible for the administration of the 106 EDA in Ontario.
<b><u>Liberalist</u></b>	The program which helps EDAs and PTAs outreach to their membership and the voting population at large it is also useful for tracking voter intent during an election.
<b><u>EDA</u></b>	Stands for the Electoral District Association. Responsible for the management of the EDA between elections; this includes communications, fundraising, membership, and election readiness.
<b><u>AGM</u></b>	Annual General Meeting. It can happen at the local (EDA) or provincial (LPC(O)) level. During an AGM, table officers are elected, presentations are given, and votes are taken regarding policies at that level.
<b><u>OWLC</u></b>	Ontario Women's Liberal Commission. Organization with the express goal of electing more female Liberal MPs. Holds an AGM, elects table officers, and raises funds for female candidates.
<b><u>OYL</u></b>	Ontario Young Liberals. Responsible for the management, recruitment, and promotion of young liberals across the province, both provincially and federally. Holds an AGM and elects an executive board.
<b><u>APLCO</u></b>	Aboriginal People's Liberal Commission of Ontario. Responsible for the management, recruitment, and promotion of aboriginal Liberals across Ontario.
<b><u>MP</u></b>	Member of Parliament. Elected by the residents of the electoral district association, represents them in the parliament of Canada.
<b><u>PTA</u></b>	There are 13 Provincial and Territorial Associations in the Liberal Party of Canada. LPC(O) is the Ontario PTA.